

## Personnel Module

This module is used to add new employees to the Human Resources system and update information on file for current employees. Fields displayed with blue type are not accessible to you as the information is generated and filled in by the system.

This module consists of the following eleven screens:

- Primary Employee Screen
- Professional Personnel Register
- Registry of Educational Personnel
- Payroll Contracts/Salaries Preparation
- Optional Employee Data
- Employee Photo Data
- Personnel Module Control Screen
- Teacher Contract Setup
- Salary Schedule Definition
- Salary Index Multiplier Schedule
- Longevity Schedule Definition

The following applies to all segments of this chapter.

*Mandatory Field* at the beginning of a description indicates the system requires an entry in the field. You may not successfully save the data on this screen if the field is blank.

*System-maintained Field* at the beginning of a description informs you that the field is maintained by the system and cannot be updated by the user on the screen. The data in these fields is normally displayed in color (usually blue) to help you notice the difference between them and fields that you may change.

## Primary Employee Data Screen

The *Primary Employee Data Screen* is used to enter and maintain basic demographic and personnel data for employees. It is important to enter complete and accurate data, as the information entered is used throughout the HR system to generate not only employee records within your district, but also information that is reported to the Federal and State governments.

The *Primary Employee Data Screen* is the first screen used when entering a new employee in the system.

*Mandatory Field* at the beginning of a description indicates the system requires an entry in the field. You may not successfully save the data on this screen if the field is blank.

*System-maintained Field* at the beginning of a description informs you that the field is maintained by the system and cannot be updated by the user on the screen. The data in these fields is normally displayed in color (usually blue) to help you notice the difference between them and fields that you may change.

To use the *Primary Employee Data Screen*, select **Modules > Personnel > Primary Employee Screen**. To add a new employee, select **New (F9)** from the Menu Bar, enter data in all mandatory fields and then select **Save (F4)**. The system will respond with the message “*Employee record added successfully.*” To update information for an existing employee, enter the desired changes and select **Save (F4)**. The system will respond with the message “*Employee Record Updated.*”

The screenshot shows the 'Primary Employee Data Screen' window. At the top, there are fields for SSN, Name (L,F,M), and Building. Below this is the 'Employee Demographic Information' section, which includes fields for Street Address (1234 TESTING RD.), City, State, Zip (PAW PAW MI 49079), Gender (F = Female), Ethnic (2 = White - not I), Carrier Route, Phone No. ([ ] - 0), Listed? (? = blank), and Birthday (01/24/1961). The 'Hire Date & Service Years' section contains Hire Date (08/14/2006), Termination Date (//), REP Employ. Status (Returning emp), Old ORS Status (sp No Change in S), ORS Status Code (No Change in !), Rehire Date (//), District Years (0.00), Military Years (0.00), Other Years (0.00), and Total Service Years (0.00). The 'Seniority Information' section includes Seniority Date (//), Seniority Sequence (0), and Seniority List. The 'Miscellaneous Information' section contains Tenure Date (//), Tenure Code, Organization Code (ADMINISTRATIO), Classification (A), TSA Status (Acl), Title, Work Phone ([ ] - 0), Extension # 1 and # 2, Third Party Employee? (FTE 0.00), TB Test Date (//), Evaluation Date (//), and Fingerprint Date (//). A 'Leave Of Absence' section includes Leave Date (//), Leave Code, and Return Date (//).

*Primary Employee Data Screen*

## Data Field Descriptions

### Employee Demographic Information section

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**SSN Number**      *Mandatory field.* The employee's Social Security Number serves as the unique key to employee records in the HR System. The system will not allow you to enter more than one employee record with the same social security number.

**Name (L,F,M)**      *Mandatory field.* Enter last name, first name and middle initial. The system maintains this data in uppercase characters. It is very important that the employee's legal name is entered.

**Building**      The Building field may contain any combination of up to four letters and numbers as desired. Most users make up codes, to represent the building or department where the employee's paycheck is to be delivered (e.g. HS for High School, ADMN for Administration building, etc.). Payroll checks and direct deposit mailer forms – as well as many payroll reports – are sorted first by Building code and then alphabetically by employee name within building.

**Street Address**      Enter the Street number and Street name. Note that the numeric portion of the street address and the street name are two separate fields.

**City, State, and Zip**      Enter the City, State and Zip. The *Zip* field allows for entry of the additional 4-digit code if known.

**Carrier**      The carrier field pertains to the US Postal Service Carrier Route Designation code.

**Phone**      Enter the area code and phone number. This field is self-formatting; therefore, it is not necessary to enter the () parentheses or the dash.

**Listed?**      Click on the drop-down box and select either L=Listed or U=Unlisted regarding whether the employee wants the phone number private or not. The default is blank.

**Gender**      *Mandatory field.* Click on the drop-down box and select either F=Female or M=Male.

**Ethnic**      *Mandatory field.* Click on the drop-down box and select the appropriate ethnic code for the employee. Selection choices are:

- 1=American Indian/Alaskan Native
- 2=White, not of Hispanic origin
- 3=Black, not of Hispanic origin
- 4=Asian or Pacific Islander
- 5=Hispanic

Note that more detailed racial/ethnic codes are required on the *Registry of Educational Personnel* screen.

**Birthday**      Enter the birth date of the employee. This field is self-formatting; therefore, it is

not necessary to enter the slashes (/).

### Hire Date and Service Years section

<b>Hire Date</b>	<i>Mandatory field.</i> Enter the employee's hire date.
<b>Termination Date</b>	Enter the employee's termination date if applicable.
<b>REP Employ Status</b>	<i>Mandatory field.</i> Click the drop down box and select the appropriate Registry of Educational Personnel (REP) code that currently applies to this employee. The codes are defined by the State of Michigan's Center for Educational Performance and Information (CEPI).
<b>Old ORS Status</b>	<i>System-maintained Field.</i>
<b>ORS Status Code</b>	<i>Mandatory field.</i> This code is used for pay period reporting of employee data to the Office of Retirement Services. Click the drop down box and select the appropriate code that currently applies to this employee. The codes are defined by ORS.
<b>Rehire Date</b>	If your district has employed the employee previously, you may enter a rehire date.
<b>District Years</b>	Enter years the employee has been with your district.
<b>Military Years</b>	Enter Military years for which the employee may have received credit.
<b>Other Years</b>	Enter any other years of experience for which the employee may have received credit.
<b>Total Service Years</b>	<i>System-maintained Field.</i> Once the data is entered in the previous three fields and you click Save (F4), the total years of service will be calculated by the system and automatically inserted in this field in blue.

### Seniority Information section

<b>Seniority Date</b>	Enter the seniority date for the employee.
<b>Seniority Sequence</b>	This field may be used to determine seniority order when two or more employees have the same seniority date. You may enter a number up to 999. When two or more employees are on the same Seniority List with the same Seniority date, the employee with the lowest number has the most seniority.

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**Seniority List** The Seniority List field may contain any combination of up to two letters and numbers desired. Most users make up codes, to represent the seniority lists maintained within the district. (e.g. T for teachers, A for administrators, C for custodians, etc.) Seniority Lists are usually maintained for each bargaining unit within the district.

**Memo Field** The white box below the Seniority List field is a *memo field* and can be used to enter any notes you may wish regarding this employee. This field is not linked to any reports at this time.

### Leave of Absence section

**Leave Date** This field may be used to aid in tracking employee's leaves of absence. Enter the date the employee's leave began or is scheduled to begin.

**Leave Code** The Leave Code field may contain any combination of up to two letters and numbers desired. It is suggested that you use the *ORS Status Code* where appropriate; however, users may define their own codes, to represent the types of leave allowed within their district. Enter the leave code appropriate for the employee.

**Return Date** Enter the date the employee returned from – or is scheduled to return from - their leave.

**Memo Field** The white box below the Return Date field is a *memo field* and can be used to enter any notes you may wish regarding this employee's leave of absence. This field is not linked to any reports at this time.

### Miscellaneous Information section

**Tenure Date** Enter the date the employee received tenure. The date entered here will print on the teacher's contract.

**Tenure Code** Click the drop down box to choose the tenure status of the employee.

**Organization Code** Click the drop down box and select the Organization Code for the employee. Teachers are required to have an organization code "01" entered. The codes are defined in the *Personnel* module on the *Personnel Module Control Screen*.

**Classification** Classification Codes may be defined by your district. (i.e. S for Secretaries, T for teachers, A for administrators, etc.) This field has no relationship with the Office of Retirement Services Employee Classification code, or with any other code defined by other governmental agencies. It is only for the internal use by the district.

**TSA Status** The TSA Status may be used to enter the status code to be reported to TSA in the Demographic Data export file and contains the following values:

A for Active, T for Terminated, S for Subs and PT for Part Time.

<b>Title</b>	This field may be used as wished by the district (i.e. HS Secretary, Food Service Director, etc.). This field is not linked to any reports at this time.
<b>Work Phone</b>	Enter employee's work phone number. You need only enter the numbers as the HR system automatically formats the layout.
<b>Extension #1 and #2</b>	Enter up to two different extensions for the work number listed.
<b>Third Party Employee?</b>	Enter Y for yes or N for no.
<b>FTE</b>	Enter the employee's Full Time Equivalency (FTE).
<b>TB Test Date</b>	Enter the date of the employee's most recent TB Test.
<b>Evaluation Date</b>	Enter the date of the employee's most recent evaluation.
<b>Fingerprint Date</b>	Enter the date of the employee's fingerprint processing.

## Reports

<b>Master Personnel Record</b>	This report displays data from the <i>Primary Employee Screen</i> , as well as selected fields from other screens in the HR System. It has been retained in the system but is obsolete and of limited value.
<b>Employee Mailing Labels</b>	Mailing labels may be requested for all employees, or for employees with a selected combination of <i>Building</i> and/or <i>Organization</i> codes.
<b>United Way Pledge Cards</b>	This report is obsolete, having been replaced by the Export (found under <i>Tools</i> ) of employee data for <i>United Way</i> .
<b>Seniority Report</b>	You may choose to print Seniority Lists by Seniority List Codes or leave blank to print for all employees.
<b>Employee Birthday List Report</b>	Birthday Lists may be requested for one building, one organization code, or if left blank – all employees. Reports print one alpha page per month.
<b>Employee TB Test Dates Report</b>	The TB Test Date Report may be requested for one building, by one organization code, or if left blank – all employees.
<b>Employee Service Years</b>	The <i>Employee Service Years Report</i> may be requested for one building, by one organization code, or if left blank – all employees.

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## Report

**User Defined Reports** Displays a list of all reports available on the *Primary Employee Data Screen*, including system-defined and user-created reports. Scroll through the list, highlight the report you want to use by clicking on it, and then click OK.

## Using the Primary Employee Data Screen

To change an employee's middle initial, do the following:

- Retrieve the employee whose initial you want to change, by typing their social security number in the SSN field.
- Tab to the middle initial field and enter the new initial.
- Click on Save or press the F4 key.
- The system will respond with the Human Resources System Status "Employee Name has been changed. Please verify correct results."
- Press the OK button.
- The system will respond with the K/RESA System Message "Do you wish to Save the new name?"
- Press the Yes button.
- The system will display the message "Employee Record Updated." in the upper right of the screen. To display the last message from the system, press Ctrl+M keys.

## Operations

**Yearly Increment of District Yrs Field** All non-terminated employees will have one year added to their *District Years* field.

## Professional Personnel Register

Note: This screen (including reports and operations) is obsolete, but may still be used to track information.

When you choose **Modules > Personnel > Professional Personnel Register**, you will see the following:

Employee Register of Professional Personnel Record						
SSN	012-34-5678	Name (L.F.M)	BROWN	ANGEL	Building	1008
Building No.	1234	Full Time	1	Assignment 1	EX	
				Assignment 2	LX	
Sex Code	F = Female	Major # 1	EX			
Birth Year	70	Major # 2	LX	Level	2	
Certificate	5	Minor # 1	BA	Total Salary	33,280.00	
Expire Year	06/30/2004	Minor # 2				
		Minor # 3		Experience	7.00	
Institution	08			Ethnic Code	2 = White - r	
Degree	1					
Fields Not Included on Professional Personnel Register						
Cert. Issue	//	Term. Date	//	Term. Code	= active	

The *Employee Register of Professional Personnel Record* screen is used to maintain data required on the *Register of Professional Personnel (ROPP) report (Form TE-4142)*. This report is required by the State of Michigan, Department of Education and must normally be reported by sometime in December of the school year.

### General Instructions

- Update information for all personnel listed on the register who are currently employed by your district.
- Report only full-time permanent or part-time permanent employees. Do not report personnel who are on a day-to-day substitute basis.
- Increment Years of Service (see Preparing the Register of Professional Personnel Report on pages 7 & 8).
- Transfer Primary Contract figure from Payroll to Total Salary field (see Preparing the Register of Professional Personnel Report on pages 7 & 8).

## Specific Instructions by Field

Fields which are displayed in blue can not be updated on the screen, they must be updated on the *Personnel & Primary & Employee Data Screen*. The remaining fields should be updated to include codes as described in materials obtained from the Department of Education. **Please note that the system does not validate these codes, so verify entries for correctness after you make changes to employee records.**

1. Social Security Number:  
Please verify accuracy of number.
2. Name:  
As entered on the Primary Employee Screen
3. School Building Number:  
Note: not necessarily the same as Building on all other screens. Please refer to the updated building list. If you need a code for a new building, please call the Information Service Center at (517) 335-2005. Administration Building is 0000.
1. Data in the following fields are automatically retrieved from the Primary Employee Data Screen.
  - Sex:
  - Birth Year:
  - Experience:
  - Ethnic Code:
  - Term Date:
  - Term Code:
2. Valid entries for all other fields after the School Building Number should be obtained from the instructions for the Register of Professional Personnel for the current school year. This document is sent to your district by the State of Michigan, Department of Education, Office of Professional Preparation Services, 608 West Allegan Street, P.O. Box 30008, Lansing, MI 48909. Their phone number is (517) 335-0590 or can be downloaded from the MEIS web site.

## PREPARING THE REGISTER OF PROFESSIONAL PERSONNEL REPORT

Before submitting the Register of Professional Personnel report, two mass changes should be made. The first operation will increment the years of experience by one from the years reported on the previous year's register report. The second operation will copy the total contract from the *Payroll Primary Contract Screen* to the Total Salary field on the *Employee Register of Professional Personnel Screen*.

**Increment Years of Service** - Normally, this step should be done around October 1st, to include personnel hired for the current school year. **IMPORTANT: This operation should only be performed once in a fiscal year.** Unsure if this operation has already

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been performed for the current school year? Check the Operations/Errors Log (*Modules, Payroll Module Administration, Payroll Module Control Screen, Reports, Operations/Error Log* and enter the date of 07/01/nn (where nn is the beginning of the current fiscal year)). Look for the entries  *Yearly increment of District Yrs. Field : begin*  followed immediately by  *Yearly increment of District Yrs. Field : end* . If these entries are not found, perform the following steps to increment Years of Service. In the *Personnel* module, on the *Primary Employee Data Screen*, select the menu choice *Operations, Yearly Increment of District Yrs. Field*. This operation will ask you to perform a backup of your data files, so that you can restore them to their current values, if you have a problem with the operation or if you determine that the years have already been incremented to their correct amounts. Perform the backup and then proceed with the operation. When the operation has completed successfully, you should receive the message  *Press ENTER for Operations available* . Also, note that the Operations/Error Log should now contain the entries  *Yearly increment of District Yrs. Field : begin*  followed immediately by  *Yearly increment of District Yrs. Field : end* . Note that for employees who are not to receive one full year of service, you must now manually update their district years to display the correct amount.

**Transfer Salary Amounts** - Choose *Modules, Payroll Employee Records, Primary Contract/Salary Screen, Operations, Transfer Contract amount to MPSERS Pay Rate, Prof. Pers. Salary*. When prompted to perform a backup choose *Yes*. After the backup is finished, the prompt  *This Operation does the following: All employees with Contracted? = T will have their Contract Amount transferred from the Payroll Primary Contract Screen to the MPSERS Rate of Pay and the Register of Professional Personnel Salary. Proceed with Operation?*  Choose *Yes*. Even if this operation was performed earlier in the school year, it is important to perform this step now so that the most current contract amount is included on the Register of Profession Personnel.

**Print Register of Professional Personnel** - Choose *Modules, Personnel, Professional Personnel Register Screen, Reports, Register of Professional Personnel* report. This report includes all non-terminated employees who have a code in the *Certificate* field on the screen. Review the report for correctness, making sure that employees who should no longer appear are omitted and newly hired employees appear correctly. Also, verify that employees who should have changes made from the codes of last year's report have been updated correctly. Print two final copies of the report: one to retain in the district and one to include with the disk submitted to the Department of Education.

**Prepare Diskettes with Register of Professional Personnel Information** - In the *Personnel* module, on the *Professional Personnel Register Screen*, select *Operations, Create Register of Professional Personnel file*. This operation will ask you to provide a filename (including drive) for the file to be created. The default will be *a:\register.txt*. If you wish to produce the diskette in the *a:* drive of your computer, this filename is correct. To produce the file on another drive and/or with another name, fill in a *drive:\filename.ext* as desired. You must also enter the two digit school year to be included in the register. Enter the last two digits of the starting year of the report period (for example: for the 1998-1999 report, enter 98"). Then, select *OK*. The operation will proceed by scrolling employee report data on the screen until complete. The system will then display a message  *Please note total records n*  for you to note and include on the label of the disk you submit to the Department of Education. After noting the total records, press the *ENTER* key to

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complete the procedure. You should repeat the above steps to make a backup copy of the diskette to retain in your district for future reference. Prepare a disk label, per the sample shown on page 10 including the following information:

- a) school district name and five digit number
- b) total records on the disk (from the message noted above).
- c) name and phone number of person who prepared the disk
- d) name and phone number of person to whom the disk should be returned

### **Submitting the Register of Professional Personnel**

Send the disk and one printed copy of the report to:

State of Michigan  
Department of Education  
Office of Professional Preparation Services  
608 West Allegan Street, P.O. Box 30008  
Lansing, MI 48909

## Registry of Educational Personnel Screen

The *Registry of Educational Personnel Screen* is used to enter and maintain data required to be submitted to the *Center for Educational Performance and Information (CEPI)*, as the *Registry of Educational Personnel* report.

For more information regarding the *REP* reporting requirements, go to [http://www.michigan.gov/cepi/0,1607,7-113-986\\_10478---,00.html](http://www.michigan.gov/cepi/0,1607,7-113-986_10478---,00.html) and review the instructions and documents found there. The section labeled *REP Data Manual* contains documents describing current reporting standards and formats. Other important documents and instructions are found in the other areas of this site.

When you select **Modules > Personnel > Registry of Educational Personnel**, the following screen appears.

The screen consists of five tabbed pages. The first four contain selected areas of the Registry of Educational Personnel data required by CEPI; the *Highly Qualified Criteria* page includes a tool for tracking the assignments that employees are highly qualified to work in.

The screenshot displays the 'Registry of Educational Personnel - Demographic Tab' interface. At the top, there are navigation tabs: Demographic, Assignment Data, Credential Data, Professional Development, and Highly Qualified Criteria. The 'Demographic' tab is active. The form contains the following fields and options:

- SSN: --
- P.I.C.: 12345
- Name (L,F,M): [Empty]
- Building: E
- Include in REP submission?:
- Gender: M = Male
- Birthdate: 03/28/1970
- Racial/Ethnic Code: Enter codes. The REP requires Ethnic Codes based on new specifications. The old Ethnic Code is: 2 = White - not Hispanic
- 1 - White
- REP Hire and Termination Data:
  - Hire Date: 08/24/1993
  - Termination/Seperation Date: //
  - Employment Status: Returning employee, new (non-instru)
- Highest Educational Level: 04=Masters Degree

*Registry of Educational Personnel – Demographic Tab*

### Data Field Descriptions

**SSN, Name (L, F, M) and Building** *System-maintained Field* - These fields are shown as entered in the *Personnel Module* on the *Primary Employee Screen*. The employee *Name* and *Building* fields may only be changed on that screen. If you type a number in the *SSN* field, the system will display the data for the employee with that Social Security Number, or the closest match. If you type in the

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*Name* field - through the middle initial - the system will display the data for the employee with that name or the closest match. If you type a name that matches more than one employee in the system, the system will display a screen of employee names with the message *Please select desired employee name and click OK*. You may then select the employee whose record you wish to see.

The remainder of the Data Field Descriptions is divided into sections for each of the tabs labeled across the top of the screen. When you click on a tab, the system displays a screen of data related to the heading.

## Demographic Tab

This Demographic screen, as displayed on the previous page, displays employee demographic data, as described below.

- P.I.C.** This field contains the employee's *Personal Identification Code (PIC)*, as defined by CEPI. To update this field in mass for all employees in your system, refer to the *Operations* section below, the *Operation > Import PIC data from CEPI XML file*.
- Include in REP submission?** If the employee is to be included in the next REP report to be submitted to the CEPI using the file created from the HR System, check this field. When an employee has this field checked, their record will appear on the *Reports > Registry of Educational Personnel* and other related reports, as well as included in the export file created by the *Operations > Create Registry of Educational Personnel file*. When an employee is terminated, you must submit them on the next REP report. Then, after you have successfully submitted the record, remove the check in this field, to prevent them from being included in subsequent reports. You may use the *Reports > REP records with Employment Status other than 99* to help you keep this field up to date.

**Gender** *System-maintained Field* - This field displays the value from the *Primary Employee Screen*.

**Birthday** This field displays the value found on the *Primary Employee Screen*. You may update this value on either screen.

**Racial/Ethnic Code** The six boxes below this field indicate up to six "ethnic origins" and associated "orders of ethnic dominance" to describe the employee. Click the *Enter Codes* button and select the appropriate ethnic origin(s) and order(s) of dominance for the employee, using the screen as shown below.

**The old Ethnic Code is:** *System-maintained Field* - This field displays the *Ethnic Code* which was previously entered in the *Primary Employee Screen*.

**Hire Date** This field contains the hire date for this employee, to be reported on the REP

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report and export file. If circumstances require, you may enter a date here that is different from the date found on the *Primary Employee Screen*. Entries made here will not change the date found on the *Primary Employee Screen*; however, if you change the date on the *Primary Employee Screen*, the system will revise this date to match it

**Termination/  
Separation Date** This field contains the termination date for this employee, to be reported on the REP report and export file. If circumstances require, you may enter a date here that is different from the date found on the *Primary Employee Screen*. Entries made here will not change the date found on the *Primary Employee Screen*; however, if you change the date on the *Primary Employee Screen*, the system will revise this date to match it.

**Employment  
Status** Click the drop-down box and select the appropriate employment status information. The system attempts to keep the *Hire Date*, *Termination Date* and *Employment Status* fields consistent. Therefore, if an employee does not have an entry in the *Termination Date*, the system will not allow you to enter an *Employment Status* such as retired, laid off, etc.

**Highest  
Educational  
Level** Click on the drop-down box and select the appropriate value for the employee.

The following fields are in the section of the screen labeled *Fields from the Primary Employee Data Screen* are shown below.

**Hire Date** *System-maintained Field* - This field shows the *Hire Date* as entered on the *Primary Employee Screen*.

**Termination  
Date** *System-maintained Field* - This field shows the *Termination Date* as entered on the *Primary Employee Screen*.

**Rehire Date** *System-maintained Field* - This field shows the *Rehire Date* as entered on the *Primary Employee Screen*.

**MPSERS Term  
Code** *System-maintained Field* - This field shows the *MPSERS Term Code* as entered on the *Primary Employee Screen*. This is an obsolete field and will be removed in the future.

## Assignment Data Tab

This screen displays the assignments the employee currently holds, as to be reported to the CEPI. The CEPI allows up to 9 assignments for an employee, each of which is defined by the *School* (building), *Position* code, *Grade Setting*, *F.T.E.*, and *Accounting Code*, as well as other related data fields.

The screenshot shows the 'Registry of Educational Personnel - Assignment Data Tab' interface. At the top, there are tabs for Demographic, Assignment Data, Credential Data, Professional Development, and Highly Qualified Criteria. The 'Assignment Data' tab is active. Fields include SSN ( - - ), Name (L.F.M.), P.I.C. (12345), Annual Salary (66215), and Payroll Primary Contract (66215.00). There are also fields for REP Contract Days (0.0) and Contract Hours per day (0.00). A 'Show Account Info.' button is present. Below these are dropdown menus for Funded Position Status (9 = Filled position, regular), Title I & II, Part A Teachers (000), and Educator Effective. A section for 'School Assignment by Grade, FTE and Wage' contains a table with 9 rows. The first row is populated with data: School 06546, Position 000EX, Grade Setting 1, F.T.E. 1.00, Hourly Wage 0.00, Calc. Wage 1, Accounting Code Career and Technic, Class H 1, MAJ- 1, Min 1, Ad. 1, Reset 0. The remaining rows have empty dropdowns for School and Position, and 'select a valid code' for Accounting Code.

School	Position	Grade Setting	F.T.E.	Hourly Wage	Calc. Wage?	Accounting Code	Class H.	MAJ- Min	Ad. Reset
06546	000EX	1	1.00	0.00	1	Career and Technic	1	1	0
		2	0.00	0.00	2	<select a valid code>			
		3	0.00	0.00	3	<select a valid code>			
		4	0.00	0.00	4	<select a valid code>			
		5	0.00	0.00	5	<select a valid code>			
		6	0.00	0.00	6	<select a valid code>			
		7	0.00	0.00	7	<select a valid code>			
		8	0.00	0.00	8	<select a valid code>			
		9	0.00	0.00	9	<select a valid code>			

Registry of Educational Personnel – Assignment Data Tab

### Annual Salary

This field displays the Full-Time Base Annual Salary to be reported to CEPI. If you run the Salary/Contract Preparation screen (see Personnel module – Payroll Contracts/Salaries/Rates Preparation Screen) – “Update REP Annual and/or Hourly Rates from Rates on this screen” operation, it uses the lowest level salary amount for the Pay Scale (Salary Schedule Definition screen) for the given employee.

### Fields used to Calculate Hourly Wage

This section of the screen includes three fields that the system can use to calculate an hourly wage for the employee’s assignments. The system will use the formula: Payroll Primary Contract ÷ (REP Contract Days x Contract Hours per day).

### Payroll Primary Contract

*System-maintained Field*-This field displays the amount from the *Primary Contract/Salary Screen*.

### REP

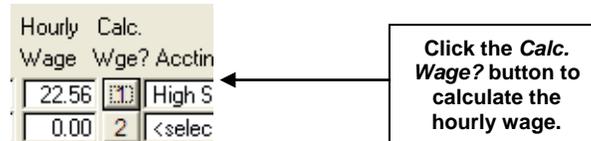
Enter the contracted days the employee works, for the purpose of calculating the

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**Contract Days** REP *Hourly Wage* as explained above.

**Contract Hours per day** Enter the hours per day the employee is contracted for, the purpose of calculating the REP *Hourly Wage*.

To calculate an *Hourly Wage* on an assignment line, click the *Calc. Wage?* button.



**Show Account Info (button)** You may click on this button, to display the accounts present on the employee's *Primary Contract/Salary Screen*, indicating the gross pay distribution by account of the wages earned from their primary contract or assignment. This may be helpful in maintaining the *Accting .Code* field on this screen.

The following fields appear on 9 lines, each of which may be used to indicate an assignment the employee currently holds.

**Funded Position Status** Enter the appropriate code for this employee, by clicking the drop-down box and selecting from the choices displayed.

**Title I & II, Part A Teachers** Enter the appropriate code for this employee, by clicking the drop-down box and selecting from the choices displayed.

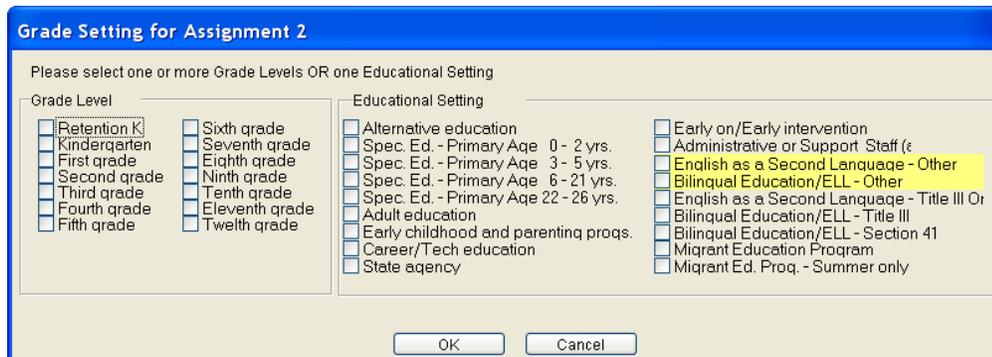
**Educator Effective** Select a code from the dropdown menu. This field should be updated per CEPI instructions, for all employees with assignment codes beginning with "73" (e.g. Principal). For further instructions, refer to the REP Addendum EOY 2011 document found on the CEPI website.

**School** This indicates the school or building, per CEPI specifications, where the assignment is performed. The choices should include all buildings in your district. Click the drop-down list and select the appropriate building.

**Position** Click the drop-down list and select the appropriate code for the position entered on this line. Note: if you do not see the correct code in the drop-down list, use the *Operation > Create New Assignments to Administration* or *Create New Bilingual Teacher Assignments* to add the needed codes to the choices contained in the drop-down list. For further instructions, refer to the section below where these operations are explained.

**Grade Setting**

To enter or change the *Grade Setting* for the assignment on this line, click the button to the left of the 22 character grade setting code. A screen similar to the one shown below will appear. You may select *either* one or more of the *Grade levels* on the left side or one of the *Educational setting* choices on the right side. Click *OK* and the setting will be entered on the *Assignment Data* screen, for this assignment.



*Grade assign 1 – Grade Setting Option box*

**FTE** Enter the *Full Time Equivalency (F.T.E)* of this assignment, for this employee.

**Hourly Wage** CEPI rules call for either an Annual Salary or an Hourly Wage to be entered for all employees. If you do not do have the system automatically figure the hourly wage as discussed earlier, enter the hourly wage here.

**Calc. Wage?** This button is used as described in the *Fields used to Calculate Hourly Wage* description above.

**Accounting Code** Enter the appropriate code for this assignment, based on the CEPI specifications.

**Class Tgth.** Enter the number of core academic classes taught (1-9) for the core academic assignment code submitted, per current CEPI specifications found in the *Data Field Descriptions* document.

**H.Q?** The *Highly Qualified* field indicates whether the staff member is highly qualified for the position code on the current assignment line. Enter a 1 (Yes) if the staff member is highly qualified for the position code chosen; enter a 2 (No) if the staff member is not highly qualified for the position code. If the assignment code does not require a highly qualified status, enter a 0.

**MAJOR?** Enter a 1 (Yes) if the staff member has an academic major - or equivalency – for the position code chosen. Enter a 2 if the answer is No and a 0 if neither yes or no is required to be reported.

**Minor?** Enter a 1 (Yes) if the staff member has an academic minor - or equivalency – for the position code chosen. Enter a 2 if the answer is No and a 0 if neither yes or no is required to be reported.

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**Ad. CE**

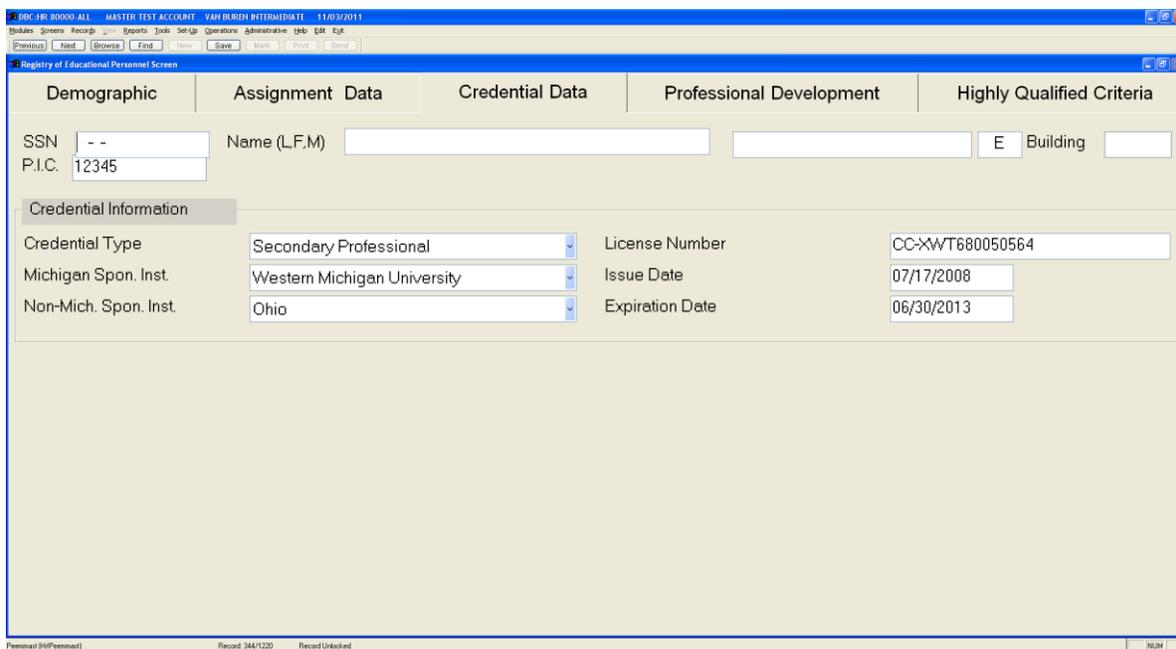
The *Administrator Continuing Education* field should be filled in for each assignment to a position that is an administrative code. Enter a 1 (Yes) if the administrator has met the continuing education requirement; enter a 2 (No) if not. Enter a 0 (zero) if not applicable to this position assignment.

**Reset  
blnk?**

Click this button to reset all fields in this line to blank.

## Credential Data Tab

The Credential Data screen displays data about the employee's credential, if appropriate.



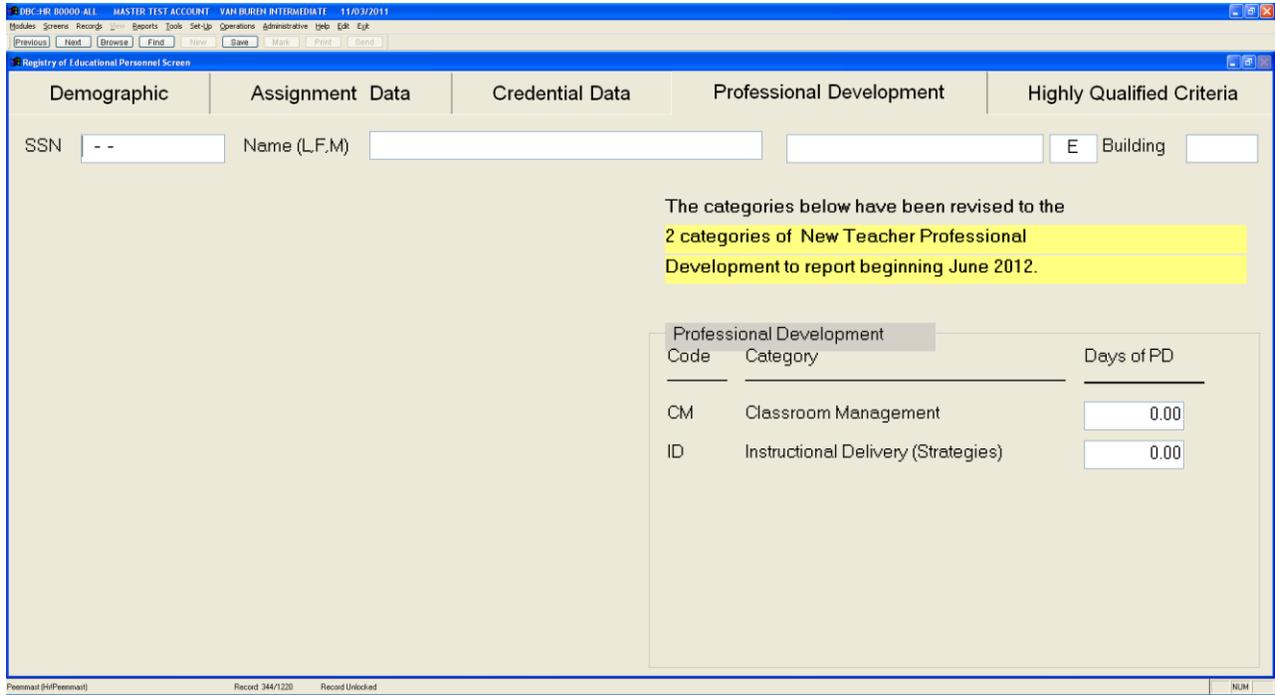
**Registry of Educational Personnel – Credential Data Tab**

**Credential Data Tab** shown above is used to maintain the following fields:

- Credential Type** Click the arrow and select the *Credential Type* for the employee.
- Michigan Spon. Inst.** This field – or *Non-Mich. Spon. Inst.* but not both - must be submitted for new teachers, per CEPI rules. Click the arrow and select the *Michigan Sponsoring Institution* that applies.
- Non-Mich. Spon. Inst.** This field – or *Michigan Spon. Inst.* but not both - must be submitted for new teachers, per CEPI rules. Click the arrow and select the *Non-Michigan Sponsoring Institution* that applies.
- License Number** If appropriate, enter the credential license number issued by the State of Michigan.
- Issue Date** If appropriate, enter the date the credential was issued.
- Expiration Date** If appropriate, enter the date of expiration of the credential.

### Professional Development Tab

The Professional Development screen displays the days of professional development the employee has received, for the current reporting period, based on the categories defined by the CEPI.



**Registry of Educational Personnel – Professional Development Tab**

**Professional Development Tab** shown above is used to maintain the following information:

**Days of PD** This field must have a value entered for each title listed. Enter the number of days of professional development for the employee. If none, enter zero.

Professional Development may be tracked in the absence module as well, and transferred into the Registry of Educational Personnel system. See the following notes for assistance in setting up the absence module for professional development:

FAQ – Employee Absence Module Setup

FAQ – REP – Transferring Professional Development Days from Absence Records to REP

The FAQs can be found on the MiCase website at [www.mi-case.org](http://www.mi-case.org).

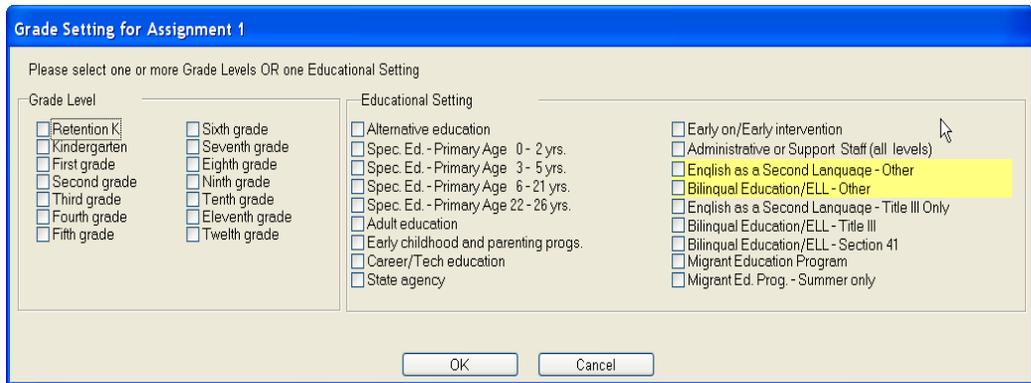
## Highly Qualified Criteria Tab

The main purpose of this tab is to allow you to enter record(s) of *Position Assignments* for which the employee is highly qualified. You **must** click the *Add Record* button to add a new record; click the *Edit Record* button to update a record; or click the *Mark Record* button to delete the line of information.

**Highly Qualified Criteria Tab** shown above is used to maintain the following information:

**Position Assignment** Enter the code that the employee is highly qualified to be assigned to.

**Chg. Gr.** Click the button and select all grade levels that the employee is highly qualified to be assigned to. The *Grade Setting* field will populate with the necessary data for the REP report. The screen appears as such:



**Criteria** In the *Criteria* field, click the arrow and select the code that corresponds to the rule from the *Michigan Department of Education* guideline that causes the employee to be highly qualified.

**Date Criteria Met** Enter the date the criteria was met.

**Remarks** Enter any remarks you wish to keep for this employee.

## Reports

**Registry of Educational Personnel** Prints a copy of all data that will be submitted to the Center for Performance & Information (CEPI) when you perform the operation to *Create Registry of Educational Personnel* file.

**REP Professional Development Days** Prints a list of employee's professional development days with category.

**REP Credential Expiration Dates** Prints a list of employees with credential information which includes the type, license number, when issued, expiration date and the institution that issued the credential – as in or out of Michigan.

**REP Records with Employment Status other than 99** Prints a list of employees whose employment status is other than 99 - *Returning employee, new (non-instructional) employee, new experienced teacher, sub or contractor.*

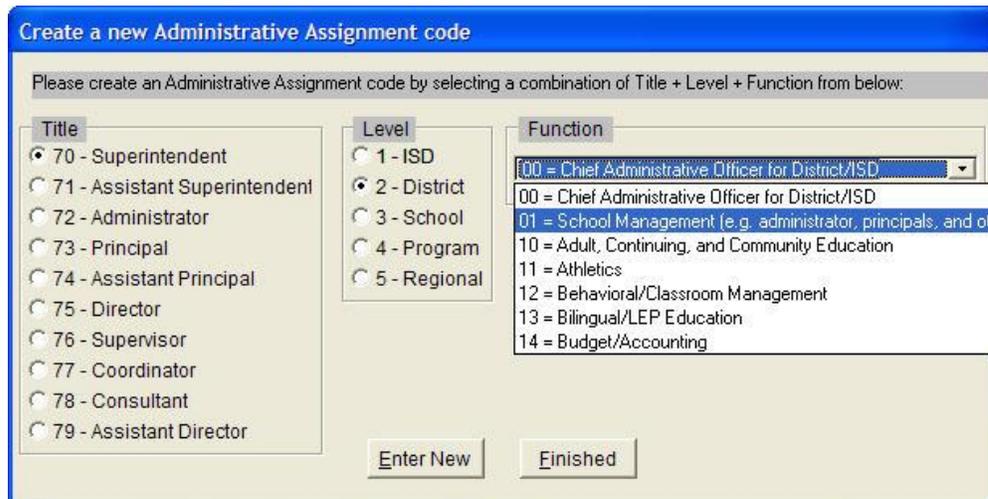
**REP Records by Hire Date with Employment Status** Prints a list of employee's employment status information sorted by hire date.

## Operations

**Create Registry of Educational** This operation will produce a file that can be uploaded to the CEPI website. This file will be named REPFILe.TXT and will be created on the root of the

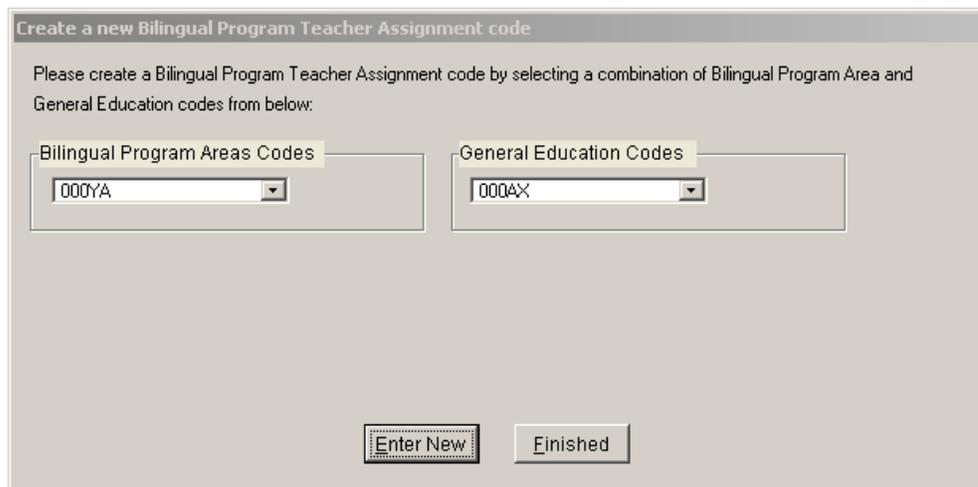
**Personnel file** drive selected. The CEPI requires that the file submitted have the extension .TXT; therefore, it is important not to rename the file.

**Create New Assignments to Administration** This operation allows you to create new assignments of administration if needed. Enter the information to create the new code and then click the Enter New button – see screenshot below.



*Create a new Administrative Assignment code screen*

**Create New Bilingual Teacher or Paraprofessional/Aide Assignments** This operation allows you to create new assignments for Bilingual Teacher of Paraprofessional/Aide Assignments. Enter the information to create the new code and then click the Enter New button – see screenshot below.



**Create Credential Data Exchange Export file** This operation runs a procedure that creates a file containing export data for the Credential Data Exchange upload. You will need to enter the drive letter where the file is to be created. You can rename the file (default is EXREPCDX.TXT) being created, but remember the file must be in text format... i.e. have a txt extension.

**Import Credential Exchange Data** This operation replaces current credential information with information provided by the Credential Data Exchange system. Enter the drive letter for

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**from CEPI file**            the file being imported and then enter the name of the file being imported.

**Update REP Hire and Term. Dates from Primary Personnel fields**      This procedure updates the *REP* hire date, termination date and termination code based on the hire date, termination date and rehire date found on the *Primary Employee Data screen*. When you select to do this operation you will see the following message:

First, all REP Hire Dates are set equal to the Hire Date found on the Primary Employee Data screen. Then, all REP Termination Dates are set equal to the Termination Date found on the Primary Employee Data screen. Next, all blank REP Termination Codes are set equal to "99" (the default code: continuing in education). Finally, for all employees with a Rehire Date on the Primary Employee Data screen, the following is done:

Once you are sure you wish to proceed, click the Yes button to confirm. Otherwise, click No to cancel the operation.

**Update REP Professional Development Days from Absence Records**      This operation does the following: First, **all Professional Development Days will be set to zero for all employees**. Then, absence records in the range of dates entered will be examined. If the Leave Code is "PD", the Leave Used will be added to the REP Professional Development Days, based on the Reason code of the absence record. Enter the beginning and ending date of the records to be processed. Click *OK* to proceed.

**Import REP data from CEPI XML file**            This operation enables you to import REP data into the MiCase REP Screen, from data contained in the XML file downloaded from the CEPI web site.

**Import PIC data from CEPI XML file**            This operation enables you to update the REP PIC field in the MiCase REP Screen, from data contained in the XML file downloaded from the CEPI web site.

**Initialize new Classes Taught field for June 2006 submission**      This operation was used, as the name implies, to initialize the contents of new fields added for the June 2006 submission. It is no longer necessary to use the feature.

## Payroll Contracts/Salaries Preparation

Payroll Contracts/Salaries/Rates Preparation Screen		Personnel Module	
SSN	[012-34-5678]	Name (L,F,M)	[BROWN] ANGEL
		Building	[1008]
Organization	[Teacher]		
Pay Scale	[MA]	Hourly Rate	[0.000]
Scale Step	[18.00]	Daily Rate	[0.00]
Longevity Year	[2.00]	Hours / Day	[0.00]
		Days / Year	[0.00]
		Base Salary	[32,000.00]
		Adjustment	[0.00]
		Longevity	[0.00]
		Total Salary	[32,000.00]
		Extra Hours	[0.00]
		Ex. Hrs Rate	[0.00]
		Contract %	[100.00]
		Pay Installs	[26]

*Payroll Contracts/Salaries Preparation screen*

### Data Field Descriptions

**Organization**

**Scale Step**

**Longevity  
Year**

**Hourly Rate**

**Daily Rate**

**Hours/Day**

**Days/Year**

**Extra Hours**

**Ex. Hrs Rate**

**Contract%**

**Pay Installs**

---

**Base Salary**

**Adjustment**

**Longevity**

**Total Salary**

**Reports**

**Teacher's Salary  
Worksheet**

**Operations**

**Custom Yearly  
Update of Teacher  
Step & Longevity  
Amounts**

**Compute Personnel  
Module Teacher  
Salaries**

**Transfer Personnel  
Module Teacher  
Salaries to Payroll  
Module**

**Transfer Personnel  
Teacher Salaries to  
Payroll – WITH  
'Retro Pay'**

**Increment Scale Step  
and Longevity Year**

**Update Pay Rates  
from Personnel  
Salary Schedule  
Definition Screen**

**Update Longevity  
amount from  
Longevity Schedule  
Definition Screen**

**Compute Total  
Salary from Hourly**

**or Daily Rate**

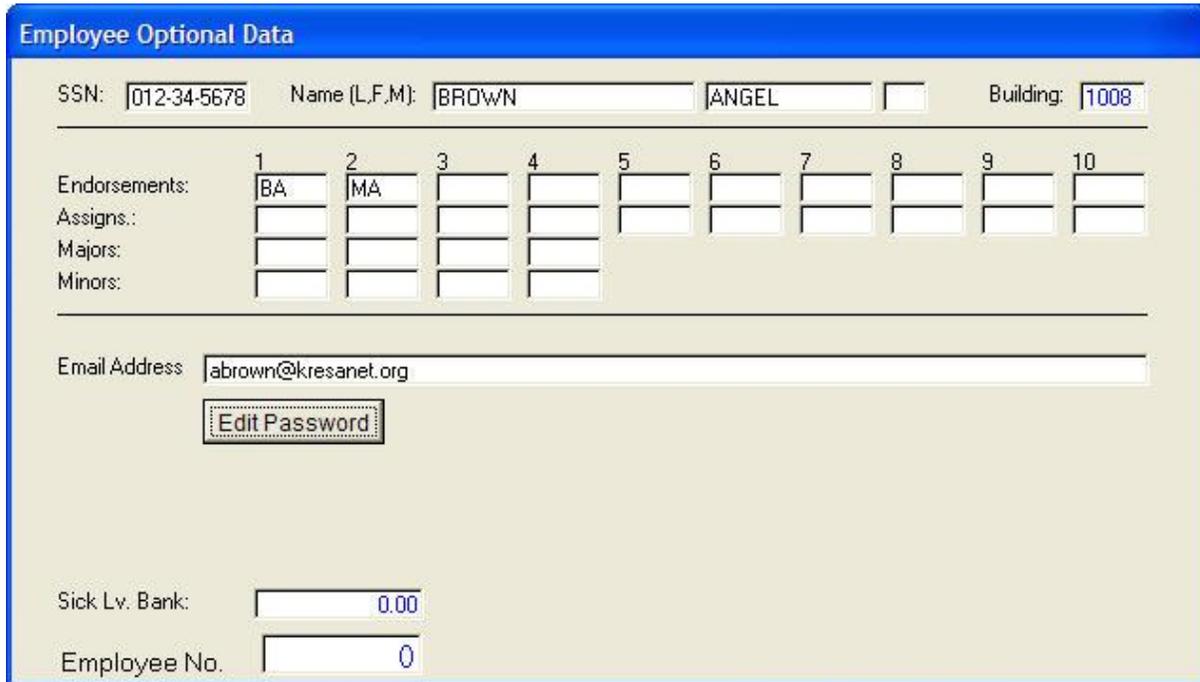
**Transfer Total Salary  
from Hourly or Daily  
Rate**

**Transfer Total Salary  
to Payroll Primary  
Contract/Salary  
Screen**

**Update REP Annual  
and/or Hourly Rates  
from Rates on this  
screen**

---

## Optional Employee Data



**Employee Optional Data**

SSN:  Name (L.F.M):    Building:

	1	2	3	4	5	6	7	8	9	10
Endorsements:	<input type="text" value="BA"/>	<input type="text" value="MA"/>	<input type="text"/>							
Assigns.:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Majors:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Minors:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Email Address:

Sick Lv. Bank:

Employee No.

*Employee Optional Data screen*

### Data Field Descriptions

**Endorsements**

**Assigns**

**Majors**

**Minors**

**Email Address**

**Edit Password**

**Sick Lv. Bank**

**Employee No.**

### Reports

There are no reports for this screen.

## Operations

Assign  
Passwords

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## Employee Photo Data

Employee Photo Data Screen Personnel Mo...

SSN 012-34-5678 Name (L,F,M) BROWN ANGEL Building 1008

Title: Math Teacher  
Nickname: Angie

Employee Picture

Insert Picture Remove Picture

Print ID Card

Picture path: C:\DOCUMENTS AND SETTINGS\EMPLOYEE\MY DOCUMENTS\MY PICTURES\HRDOCSTUFF\WOM

*Employee Photo Data screen*

### Data Field Descriptions

**Title**

**Nickname**

**Insert Picture  
Button**

**Remove Picture  
Button**

**Print ID Card**

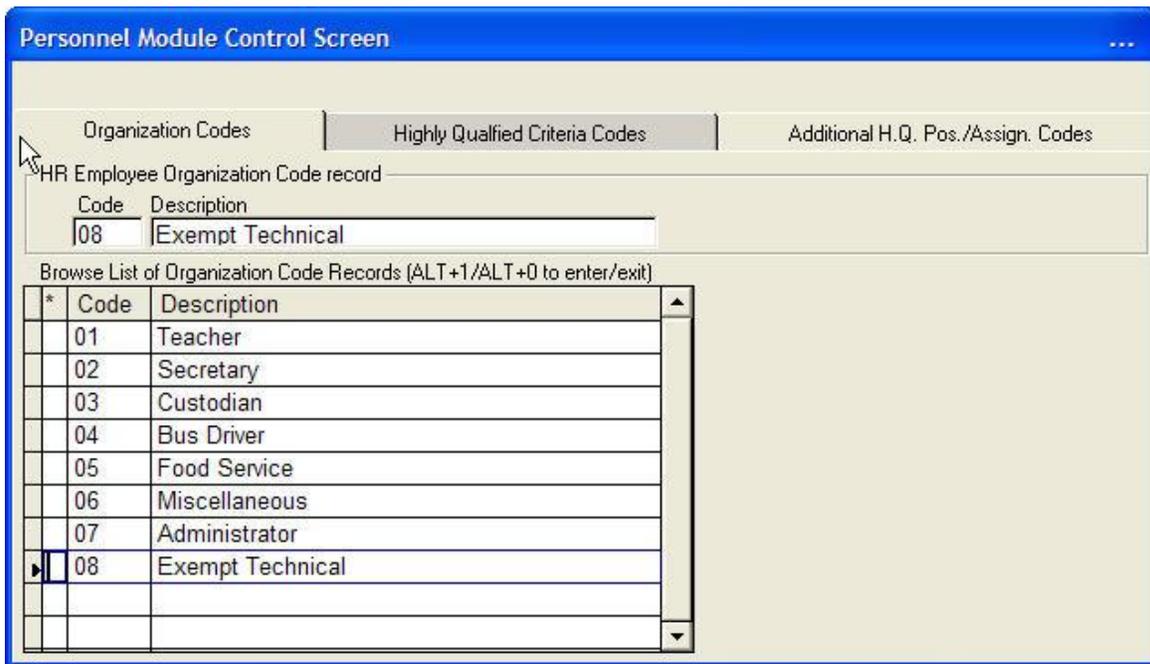
### Reports

There are no reports for this screen.

### Operations

There are no operations for this screen.

## Personnel Module Control Screen



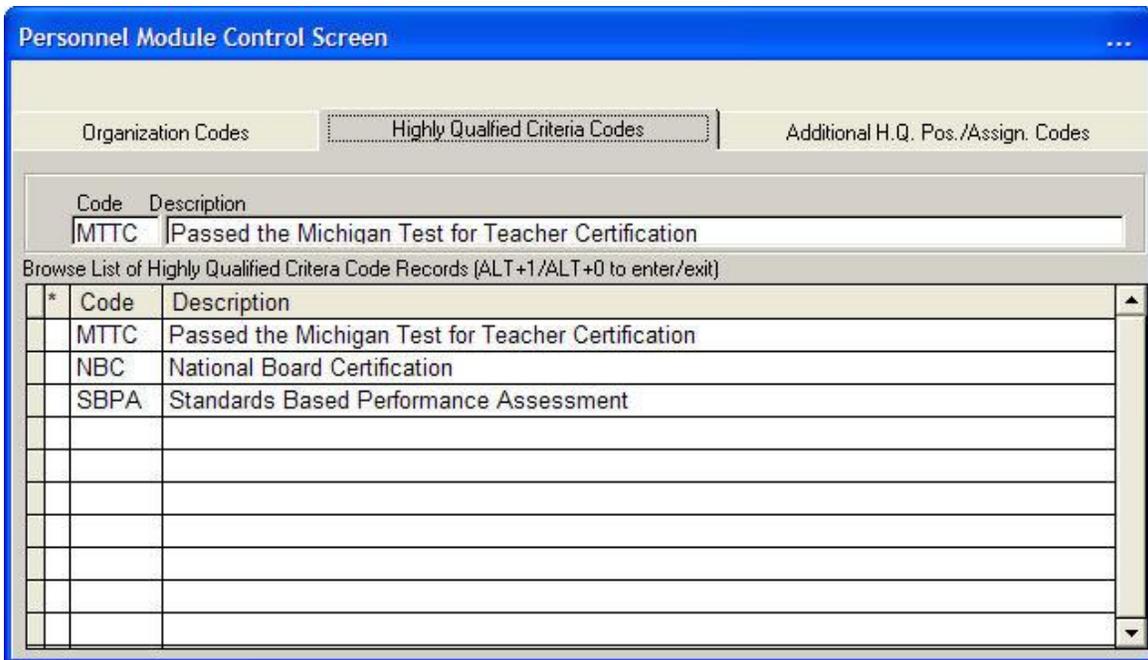
Personnel Module Control Screen – Organization Codes Tab

### Data Field Descriptions

Organization Codes Tab shown above is used to maintain the following fields

**Code**

**Description**

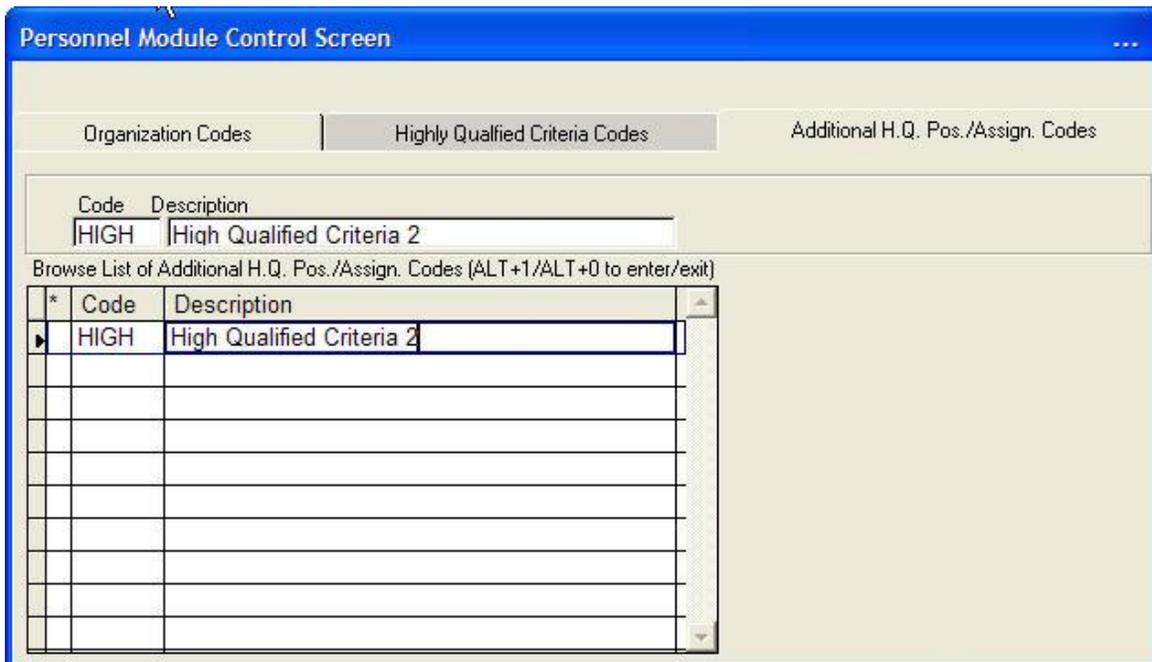


*Personnel Module Control Screen - Highly Qualified Criteria Codes tab*

Highly Qualified Criteria Codes Tab **shown above is used to maintain the following fields**

**Code**

**Description**



*Personnel Module Control Screen – Additional H.Q. Pos/Assign. Codes tab*

Additional H.Q. Pos/Assign. Codes Tab **shown above is used to maintain the following fields**

**Code**

**Description**

**Reports**

There are no reports for this screen.

**Operations**

There are no operations for this screen.

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## Teacher Contract Setup

**Teacher Contract Setup Screen** Personnel M...

Organization Name, Address, etc.

Organization : Kresa Test School

Department : High School

Street Address : 1122 No Street

City, State : Kalamazoo MI

Zip - plus : 49002

**Teacher Contract Controls**

Issue Date : 08/01/2006

Contract Year: 2006

Con. Length :

Starting Date: 08/01/2006

Ending Date : 07/30/2007

First Payroll: 08/11/2006

Return Date : 09/01/2006

**Print Items on Contract?**

Longvty Year?: Y

Longvty Amt.?: Y

Extra Hours?: N

Adjustment? : N

Sick L. Bal.?: Y

Addl Sick L.?: N

Sick L. Bank?: N

**Teacher Employment Contract - Optional Message Lines**

Line 1 : Sign and return the Administrative Copy to the Payroll Dept.

Line 2 :

*Teacher Contract Setup Screen*

### Data Field Descriptions

#### Organization Name, Address, etc. section:

Organization

Department

Street Address

City, State

Zip – plus

#### Teacher Contract Controls section:

Issue Date

Contract Year

Con. Length

Starting Date

Ending Date

**First Payroll**

**Return Date**

**Teacher Employment Contract – Optional Message Lines section**

**Line 1**

**Line 2**

**Reports**

**Teacher  
Employment  
Contracts –  
Laser Form**

**Operations**

There are no operations for this screen.

## Salary Schedule Definition

Salary Schedule Definition Screen Personnel Module

Record Filters

Organ.

Sched.

Salary Schedule Record

Organ.	Schedule ID	Pay Scale	Table Step	Pay Rate	Rate Type
01	06-07	BA	1.00	23,902.000	Y

Browse List of Salary Schedule Records (ALT+1 to enter / ALT+0 to exit)

*Organ.	Schedule	Scale	Step	Pay Rate	Type
01	02-03	BA	1.00	23206.000	
01	02-03	BA	1.00	23206.000	
01	02-03	BA	2.00	24328.000	
01	02-03	BA	3.00	25448.000	
01	02-03	BA	4.00	26560.000	
01	02-03	MA	1.00	25550.000	
01	02-03	MA	2.00	26195.000	
01	06-07	BA	1.00	23902.000	Y
01	06-07	BA	1.00	23902.000	Y
01	06-07	BA	2.00	25058.000	Y

Salary Schedule Definition screen

### Data Field Descriptions

#### Record Filters section

Organ.

Sched.

#### Salary Schedule Record

Organ.

Schedule ID

Pay Scale

Table Step

Pay Rate

Rate Type

## **Reports**

**Salary Schedule  
Table Report**

## **Operations**

**Create new salary  
table from  
current Salary  
table**

**Create new salary  
table from  
current Multiplier  
table**

**Transfer Pay  
Rates to Payroll  
Employee Gross  
Pay Rate Screen**

---

## Salary Index Multiplier Schedule

Personnel Salary Multiplier Index Schedule Screen Personnel...

Salary Multiplier Index Record

Schedule ID	Pay Scale	Table Step	Index Multiplier
06-07	B15	10.00	1.520000

Browse List of Salary Schedule Multiplier Index Records (ALT+1 to enter / ALT+0 to exit)

* Sched. ID	Pay Scale	Table Step	Index Multiplier	
06-07	B15	1.00	1.034000	▲
06-07	B15	1.00	1.142000	
06-07	B15	4.00	1.196000	
06-07	B15	5.00	1.250000	
06-07	B15	6.00	1.304000	
06-07	B15	7.00	1.358000	
06-07	B15	8.00	1.412000	
06-07	B15	9.00	1.466000	
06-07	B15	10.00	1.520000	
06-07	B15	11.00	1.594000	▼

*Personnel Salary Multiplier Index Schedule Screen*

### Data Field Descriptions

#### Record Filters section

Schedule ID

Pay Scale

Table Step

Index Multiplier

#### Reports

Salary Multiplier  
Index Schedule  
Report

#### Operations

There are no operations for this screen.

